ROUNDTABLE ON DEMOGRAPHIC CHANGES, IMPLICATIONS AND OPPORTUNITIES

Organized by

The Office of Vice-President
Research and International Cooperation
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January 18-19, 1996

Atlantic Canada Opportunities Agency | **Agence de promotion économique du Canada atlantique**

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Introduction

The current series of Academic Roundtables is an initiative begun in 1995 by ACOA, in cooperation with universities in the Atlantic region, to create a forum in which leading academics, private sector leaders, and representatives of various sectors of the economy could engage on selected issues which are pivotal to the economic development of the region. ACOA has, since its inception, maintained a dialogue with other stakeholders as a means to identify and respond to the economic needs of Atlantic Canada, and the roundtables are a continuation of that practice.

The Agency wishes to express its deep appreciation to the University of New Brunswick, and in particular to the President, Dr. Robin Armstrong, and Vice President Dr. Frank Wilson who hosted this event. The University continues to demonstrate its leadership in addressing the issues faced by academic institutions in the current environment, and is clearly committed to partnering with government and the private sector in developing new ways to realize our region's economic opportunities.

Over the past two years the federal government's policy direction has changed significantly and ACOA has also dramatically reformulated its approach to economic development. In responding to this environment it remains crucially important to maintain an effective dialogue between stakeholders who have the capability to contribute in developing new policy options. The universities, together with other academic and private policy institutions in the region represent the primary resource of economic and social policy expertise with whom the Agency can partner in addressing these challenges. The roundtables represent a mechanism to engage in such a dialogue.

The subject of Demographics was chosen for this session as a result of recent work by prominent academics which has received wide attention, and which suggests that demographic trends may provide an insight into currently important social and economic development issues. An indicator of the attention being paid to this topic is the formation by the Province of New Brunswick of a senior committee to advise the Government on its social policy planning, based upon specific demographics research. Dr. David Foot of the University of Toronto, a noted researcher and speaker on demographics was therefore asked to provide the lead presentation for this event. We express our thanks for his insights and enthusiasm.

David Slade
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Summary prepared for Atlantic Canada Opportunities Agency
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ROUNDTABLE ON DEMOGRAPHIC CHANGES, IMPLICATIONS AND OPPORTUNITIES

This roundtable was held January 18-19, 1996 and was organized by the University of New Brunswick in cooperation with the Atlantic Canada Opportunities Agency. The principal speaker was Dr. David Foot of the Department of Economics at the University of Toronto.

Keynote Address

Dr. Foot's keynote address explored the impact of the "baby boom" on Canadian markets. A normal population by age diagram looks like a pyramid, with the base being the youngest age group. However, because of the baby boom, which he defined as the period 1947-1966 (with a peak at 1960), the Canadian population pyramid has a small base with a bulge in the mid-section. There are two other phenomena at work here as well. Following the boom there was a "baby bust" from 1966 to 1980 when fertility fell dramatically. Following that, beginning in 1981 there was a "baby echo," when, despite low fertility rates, the number of births increased because of the large number of baby boomers having children.

The central theme of Dr. Foot's presentation was that the shape of the population pyramid has profound impacts on markets. For example, the bulge has been responsible for the boom and subsequent slowdown in housing markets. Dr. Foot outlined regional differences in this general picture. The echo is largest in Ontario, where school enrollments are rising. Conversely, there is no echo in Quebec. In New Brunswick the

baby boomers left and there is no echo. The relative sizes of the boom, bust, and echo have substantial effects on the tax base and the provision of public services. Dr. Foot also explored international differences. Only Canada, the United States, Australia, and New Zealand had a baby boom, with the result that international marketing involved considering the differing demographics.

Dr. Foot's address provided many examples of marketing difficulties and opportunities in the past three decades. For example, in the 1970'2, the 25-34 age group grew by 46%. This led to first a large increase in demand for apartments and very low vacancy rates. This subsequently spilled over to the housing market. In the 1980's the 15-24 age group fell by 28%. This led to problems in the brewing industry since this is a prime target group for breweries. The 0-14 group also increased and this new family formation fueled, for example, the mini-van industry.

Dr. Foot's general theme was that demographic change is a powerful force in markets and that businesses should consider this in their marketing strategies. Other effects, such as changing incomes or technology, but he ascribed 2/3 of market change to demographic change. For example, he described the large debt loads that we see now as a normal outcome of the life -cycle where debt is acquired in the 30's and 40's as part of family formation. As the baby boomers age, they shift from buying consumer goods to saving, hence the current boom in mutual funds.

Workshop Sessions

Following the keynote address, the Roundtable broke up into three workshop sessions to consider the implications of this approach to understanding change.

Issues discussed in the workshops were:

What is the future of the housing market with a small baby echo in Atlantic Canada?

Is there a future market for service-based housing for seniors?

Are there opportunities for recreation-based tourism, such as ecotours, for aging baby boomers?

Will there be reverse migration to Atlantic Canada as baby boomers retire? Should there be policies to encourage it?

Is it possible to replace the lower part of the population pyramid with immigration?

Are there markets for distance/continuing education as baby boomers have to adjust to new economic conditions?

Will the continuing migration of young people out of rural communities threaten their viability?

What can be done to retain young, educated workers?

Is there adequate planning for health care changes that will arise as baby boomers age in large numbers?

What will happen to the income of baby boomers as they pass beyond their peak earning years?

Is there sufficient planning in the public sector to ensure that infrastructure is not developed for short term rather than long term needs?

What kind of public spending is needed to accommodate the population bulge as it ages?

If Ontario/Canada as a whole has a population structure different from Atlantic Canada, will there be Federal Government policies that have a differential effect on Atlantic Canada?

Do we take into account the differences the location (urban/rural) of the population make?

Will the increasing globalization of the economy reduce the impact of demographic change?

How can there be adequate planning when it is difficult to get demographic data on catchment areas?

As the bulk of the population moves toward retirement will there

be a change in taxation from taxing income and consumption to taxing wealth and inheritance?

Will there be a vicious circle of a reduced tax base, increased tax rates, and increased out-migration?

Will early retirement decline? Will baby boomers continue to dominate the labour market because retirement will not be as financially feasible, both for individuals in taking it and for companies and governments in offering it?

Can governments address with minor adjustments the nonfunded pension liabilities that they have accumulated?

Will the retirement age instead increase beyond 65? Will there be phasing in of retirement by reducing the work component of income over several years?

Do we have the infrastructure to retain and attract people in areas other than the major centres such as Halifax or Moncton?

Do we know enough to plan for future education and training needs?

Dr. Russ King, the Minister of Health for New Brunswick, addressed the Roundtable, outlining the demographic planning being done in New Brunswick health care. It was observed by members of the Roundtable that New Brunswick is leading the way in Atlantic Canada. The other provinces do not appear to have

any apparent recognition of the impacts of demographic change.

Interaction Session

Following the reports from the workshop sessions, the remainder of the Roundtable was taken up by Dr. Foot reacting to the concerns brought forward from the workshops. Reacting to a criticism that he put forward a view that demography explains everything, he commented that it is about 2/3 of everything. More importantly, it is easy to understand and predict. The goal in planning should be to get the demographic part right first and then worry about the rest. As an illustration, he said we are in a transition phase from a manufacturing to service based economy because of aging. This represents an opportunity because there are few scale economies in service industries as services are delivered in small quantities to small groups.

His view on the future of the housing market was that while the boom has been housed there is still the generation X to be housed. Also, the echo children will enter the housing market in the next two decades.

Dr. Foot predicted that reverse migration will occur. Those who left will return with skills and experience because location is becoming less important with technological change. He stressed the importance of infrastructure, such as regional hospitals, if we are to attract 50 year olds to set up businesses outside major centres.

He was not optimistic about Atlantic Canada as a tourist desstination for domestic baby boomers. As they age they are more likely to fly and travel farther. Because of this, the best markets are likely to be foreign boomers.

One of the important labour market problems caused by the boom is that we have tried to fit a population rectangle into a workplace with a triangular hierachy. Because of this we have had the "flattening" of the job structure and "re-engineering." As a result, there are more lateral than vertical moves being made in the job market, creating a need for retraining, and for providing the skills that enable moving between jobs. One bright note was that because there are fewer young people there will not be the need for so many jobs as there have been in the past. Jobs may also be created as boomers ease into retirement by reducing their time worked.

Dr. Foot concluded with the top three priorities for demographic planning. First, look for innovative approaches to current unemployment problems. His view was that a disaffected generation is a source of political instability and we should search for ways to move younger people into the labour market. Second, look for business opportunities created by an aging population. Service-based businesses will likely become more important. Third, we should get away from a winners and losers approach. We need to have a more cooperative approach among government, business, and society in general. There needs to be a heightened recognition of the responsibilities we owe to society, rather than a simple concentration on benefits.

EXCERPTS FROM PROFESSOR DAVID FOOT'S PRESENTATION

David Foot doesn't want to be a guru. The self-confessed "mildly introverted academic" would like to be heard, without becoming famous. But Canada, his adopted and beloved homeland, needs saving, he figures. So foot is about to stride into the public arena, even if it means he might become the next - gulp! Faith Popcorn.

"I hope that doesn't happen", the economics professor moans, sinking into a chair in his comfortably cluttered University of Toronto office. "I must prefer my ideas be out there as opposed to me being out there. I don't want to be a celebrity. I'm a teacher. Believe me, being a guru can do nothing but harm your career in academia -- And I'm happy being an academic -- researching, teaching, and every now and then trying to get my message out".

Ah, but Foot's message is so powerful -- yet easy to grasp -- that it may well propel him to the forefront of public debate on how Canada should be preparing for the 21st century. Or at the very least on to the best-seller lists of the 1995 season. His new book, Boom, Bust and Echo (How to Profit from Coming Demographic Shifts), which will be published this spring by Macfarlane Walter & Ross, promises to be an essential primer for forward-looking careerists, business people and government policy workers everywhere. The book, which is co-authored by journalist Daniel Stoffman, will be a far-ranging discussion on the application of his central thesis, which is that you can predict everything about a country's future simply by looking at its demographics, specifically how its population is aging.

During a recent two-hour chat, the Australian-born, Harvard-educated professor explains how demographics is the key to understanding everything from the resurgence of the Quebec

independence movement to why still upwardly mobile 58 year-old chief executives can't seem to get along with their rudderless, living-at-home thirtysomething sons.

"The generational battle is easy to explain" Foot says, " 58 year-old was born in 1937. End of the Depression. People weren't having children. Now, it must be said he had a rough start. Remember, he was also a preteen during the war. But after that he entered the job market during the boom years of the 50's. He had his choice of jobs. The economy was moving and, comparatively speaking, he had little job competition. He's had a great ride. Great career. Affordable housing. Now his son, he was born in the late 50's. The peak of the baby boom, Canadians had, on average, 3.9 children a family in 1959. Now all these baby boomers flooded the workplace at the same time, and, of course, there just weren't enough jobs. Or houses for that matter. So of course they live at home, with Dad, who can't figure out what the heck is going on".

Foot explains the new urgency in the Quebec independence movement by saying, "Of course, there's a new sense of urgency. But again, a key is demographics. A generation ago, Quebec made up a third of Canada's population, now they represent a quarter, and that percentage is shrinking every year, so it's natural that they look to the majority for constitutional guarantees".

Once he gets going on his demographic theories, Foot becomes increasingly forceful, bouncing in his chair. "Demographics is the best economic tool we have for preparing and planning for the future --far and away the best. But we just don't use it". His forehead wrinkles and his voice becomes shrill "We just don't use it, it's crazy!"

"Our crushing deficit? That's just a reflection of the fact that in the 70's and 80's, boomers

were in their 20's and 30's. They were borrowing for cars, furniture and houses. We had a nation filled with borrowers, both in the public and private sector."

The so-called movement to family values? "People say it's growing conservatism. Nonsense. The boomers grew up and got married, started having children: of course they became preoccupied with family values."

How about Australia's recent success at the Commonwealth Games? "Australia's baby boom peaked in the late 60's and early 70's. Foot says, "Those children are now in their early and mid-20's which are, of course, prime medal-winning ages".

Foot can be forgiven if at times he sound like he's pushing his theory a bit too hard, making demographics sound like the economic equivalent of one of those miracle kitchen gadgets that do everything but drive the kids to school. It's just that he's been saying the same thing now for close to 15 years, and until recently, he's had a very difficult time getting people to listen.

"For years, I was ignored and laughed off stages" Foot remembers. "In 1977, I was asked to do a paper by the Commission of Declining School Enrolments in Ontario. I told them enrolment is declining because Canadians stopped having children after 1966. Simple enough (Elementary school boards) should transfer payments down the line to secondary schools in anticipation of the tide of boomers going through the system. I told them. They said no, if enrolment's going down, they'd prefer to put excess funding into enrichment programs, like French immersion. So I said watch out for the early 80's, enrolment will surge again because boomers will start having their own kids. You'll soon be saddled with tremendously expensive programs. Which is exactly what happened.

"In the mid-80's I was asked to speak to a conference of developers" Foot continues, his

foot suddenly alive and tapping.

"Hey fellas", I said, "are you making plans for the housing crash? Soon, the boomers will have all bought their houses and there's nobody coming up behind them. There's going to be a terrific crash.

"Now remember, this was at the very peak of the housing market. I was laughed right off the podium. Two years later, of course, the market collapsed.

But Foot is stubborn, and as would befit a man of his vocation, devoted to logic. Proof of this can be found in his small office, which is stamped with four separate anti-smoking placards and cartoons. So he continues his crusade, warning business of coming dangers. "Minivan manufacturers should be careful. They're popular now. Boomers are raising families, minivans are perfect for them, but manufacturers wholly devoted to minivans will be dead in five years because there just won't be a population group out there to buy them in sufficient numbers".He also had advice for consumers. Invest in cottages. Housing will remain flat until the early part of the next century, then enjoy a brief boom as children of baby boomers look to buy. But with Canadian baby boomers just now starting to look for retirement homes, cottages will increase in value well into the next century.

And every few months, it seems Foot weighs in with recommendations to government. Here's part of a 90's newspaper think piece. "When will the managers and politicians responsible for the public transit systems in Canada wake up and stop living in the Utopia of the past?" It's senseless pouring money into public transit in hopes of getting car drivers off crowded roads and into buses and subways, he says, "baby boomers grew up in the 1950's and 1960's and public transit systems were often initiated and expanded to accommodate their demands...Now, boomers are in

their automobile-using years".

Foot continues his campaign for a number of reasons. He's stubborn, yes and sure that he's right. But as the fight grows longer, and the boomers more involved in public debate, the University of Toronto professor has also begun to feel a greater sense of public duty.

"At first, I had real reservations about going public with my studies" he says, "I was an academic. That's not what academics are supposed to do. But a good friend of mine (and a fellow academic) persuaded me to believe that I had something worthwhile to offer. And I have to say, although I'm still not comfortable doing this, I am now convinced of the value of a few roving academics bringing their talents and expertise to the marketplace. After all, who pays our salaries? Eighty per cent of my salary is paid by the taxpayer. Certainly they deserve to benefit from my research. To a large extent they sponsored it".

This is also the time for all good economic panellists to come to the aid of the country, Foot believes. Continuous cutbacks in the public and private sectors will, he predicts, ultimately lead to disaster.

"Our (current ideological) obsession with leaner and meaner is madness. In the future, the most precious resource in business will be knowledge. Where does that come from? Employees. But relentless cutbacks leave workers apathetic. It's common sense. Everyone knows happy workers are more productive, so why undertake a continuous campaign to make them unhappy? ... You have to cut back, why not ask workers to accept a 20% decrease in salary for a 20% decrease in work? I tell that to employers; they go, "No way, our workers are overachievers, they won't go for it". He chuckles "I ask employees the same question, the vast majority say 'We'll take it' because they feel overstressed and overworked".

Ask Foot about cutbacks in social services and his eyebrows practically fly off his forehead. "What are our competitive advantages in the marketplace? A healthy, well-housed, well-educated population. Why systematically take away all of our comparative advantages for growth down the road? Cutbacks in health care? Please, let's use information we have at our disposal" he continues, returning to demographics. The front end of the baby boom, people who are 47, 48, are now entering their prime stroke, heart attack years. There will be a huge increase in prostrate cancer for men, and menopause-related problems for women. Just when we really need health care services, we start cutting back? This is literally a suicidal course."

An innovative tax scheme is the only sensible way to attack the deficit, the economics professor reasons. "Things like the Tobin tax, a small tax on foreign exchange transactions. And inheritance taxes, Canada and the United States are the only countries in the OECD that don't have inheritance taxes. And perhaps, now that the baby boomers are reaching an age where they become savers, in preparation for retirement, perhaps we should contemplate putting a tax on savings, at source, as we do for earnings. Or at least these are the things we should be talking about... Yes, let's talk about the future. Let's have some vision about where we're going. Because, before you know it the future is going to be here for us to deal with".

A vision of the future is, of course, Foot's business. Boom, Bust and Echo, his new book, may well make planning for the future all of our business. He'd like that, although he'd prefer other people do the talking. I'd like the book to spark a large public debate, one that involves my idea, though not necessarily me". This reluctant guru stuff is not false modesty, or a stage persona.

"No, I asked it be put in my (book) contract that I don't have to do a cross country tour.

It's just something I would prefer not to do", he says. Indeed, once Foot is away from his demographic theories, he seems very much the "mildly introverted academic". Getting him to stay still for the photo accompanying this article, for instance, was no easier than getting a squirming child into a snowsuit.

Still, he writes books, addresses business audiences, lectures politicians. He does so because he feels he knows something other people don't. Something important. "Canadians are afraid of the future" he says, "and that's no way to live". Foot himself says he'd like to believe in this country's future.

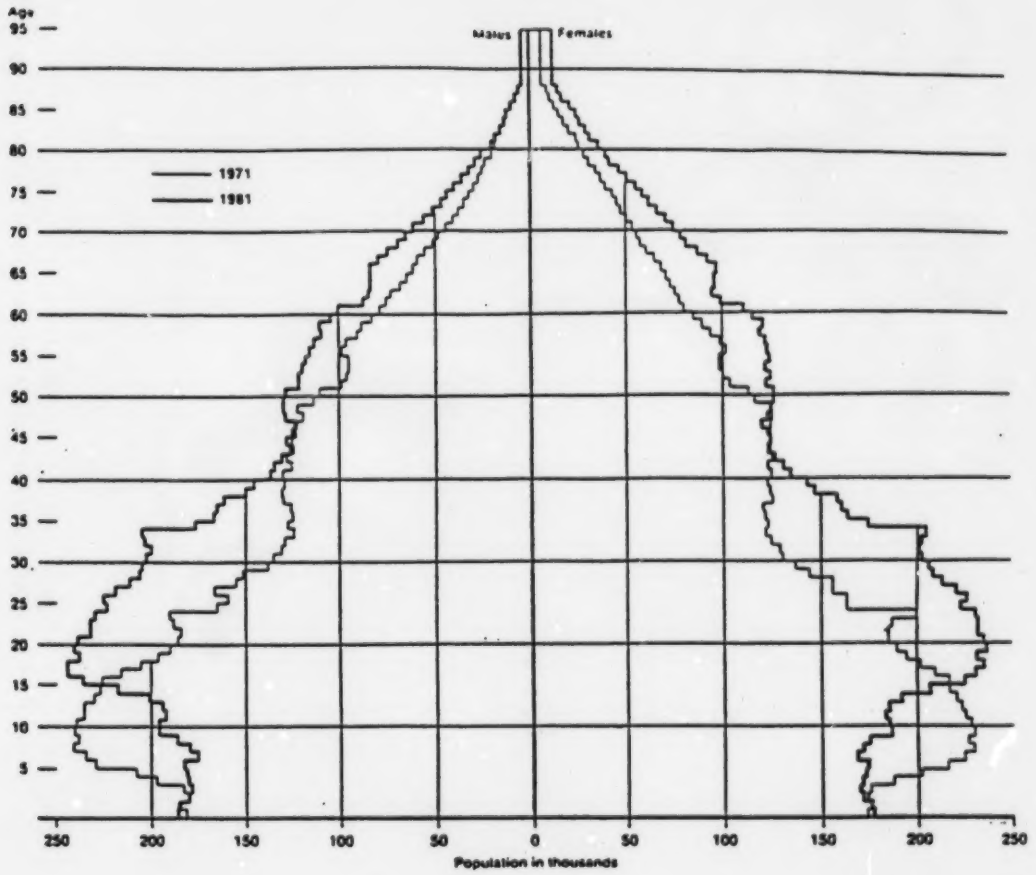
"I'm an immigrant to Canada. I consciously decided to come here (in 1971) and have never regretted it. Can this glorious country survive as we know it? Let me ask you a question: What other country has such a healthy, educated, well-housed population? Has access to the British Commonwealth as a potential market and source of high grade immigration? Has access to the Francophone state of nations with the same implication for access to markets and immigration? What other country, because of immigration, has tentacles right through Europe. What other country has a Pacific Rim and increasing access to Southeast Asia? Canadians do not know what they have, do not realize they're sitting on a gem.

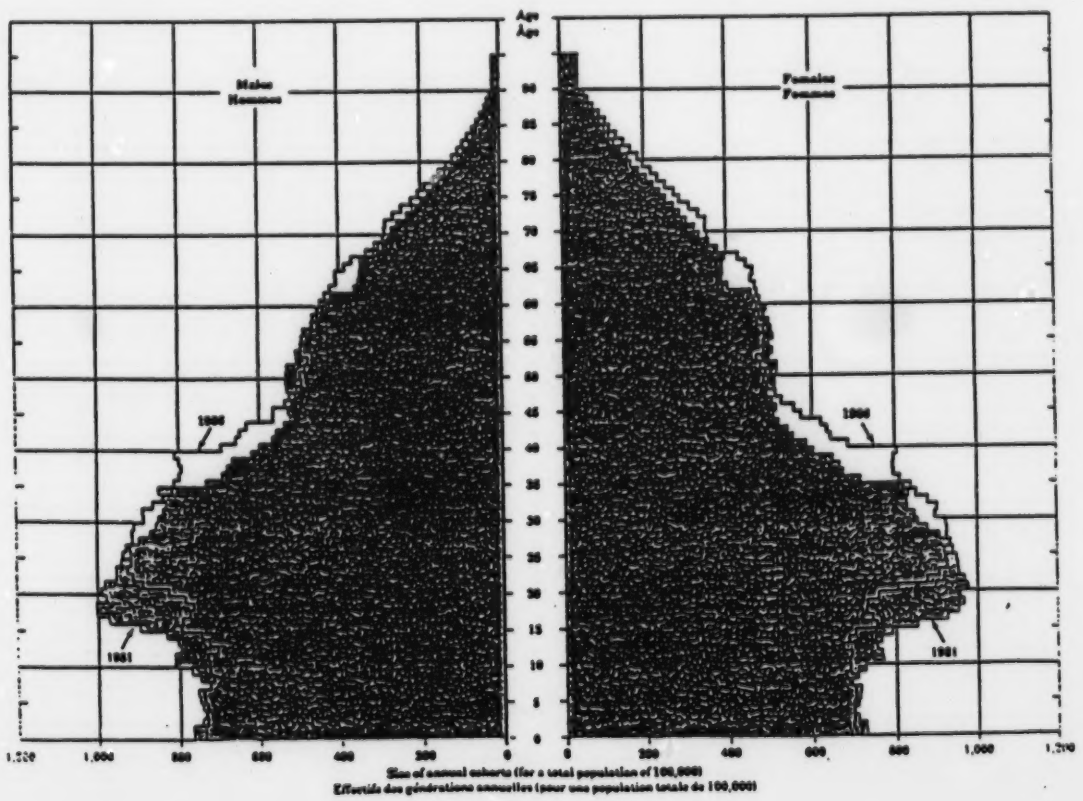
"Can we manage it?" he continues. "Can we keep it together? That's the question isn't it?" Foot shakes his head. For the first time in the interview, the guru is stumped.

GRAPHS/TABLES

FROM

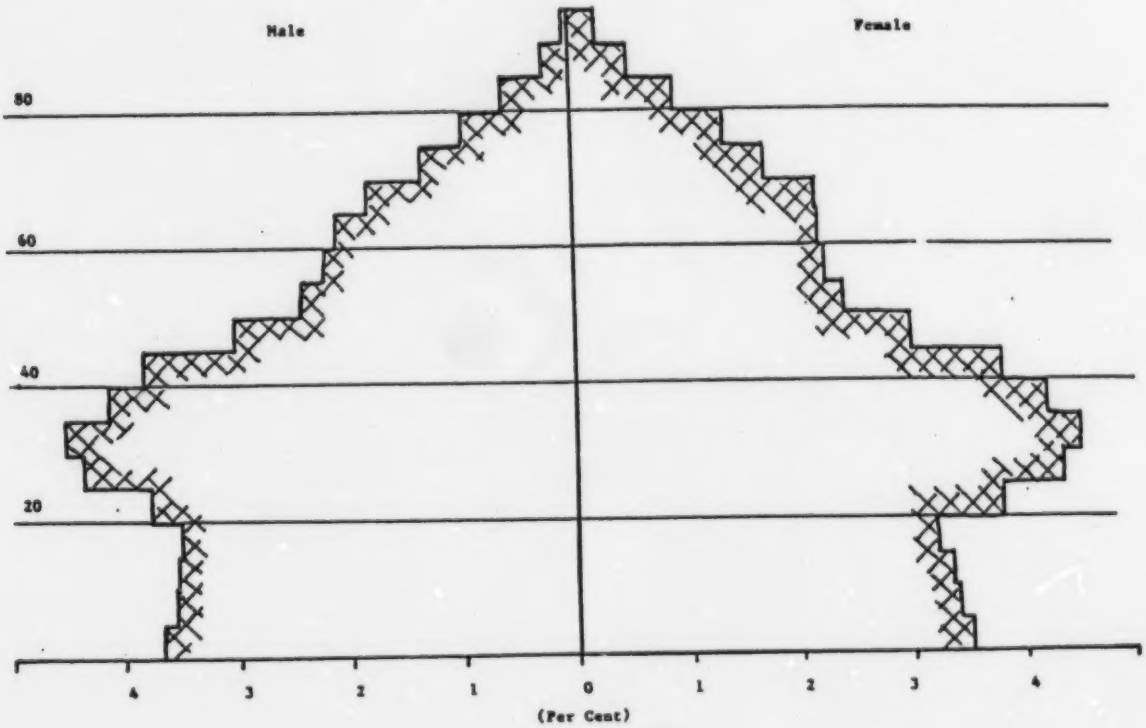
DAVID FOOT'S PRESENTATION



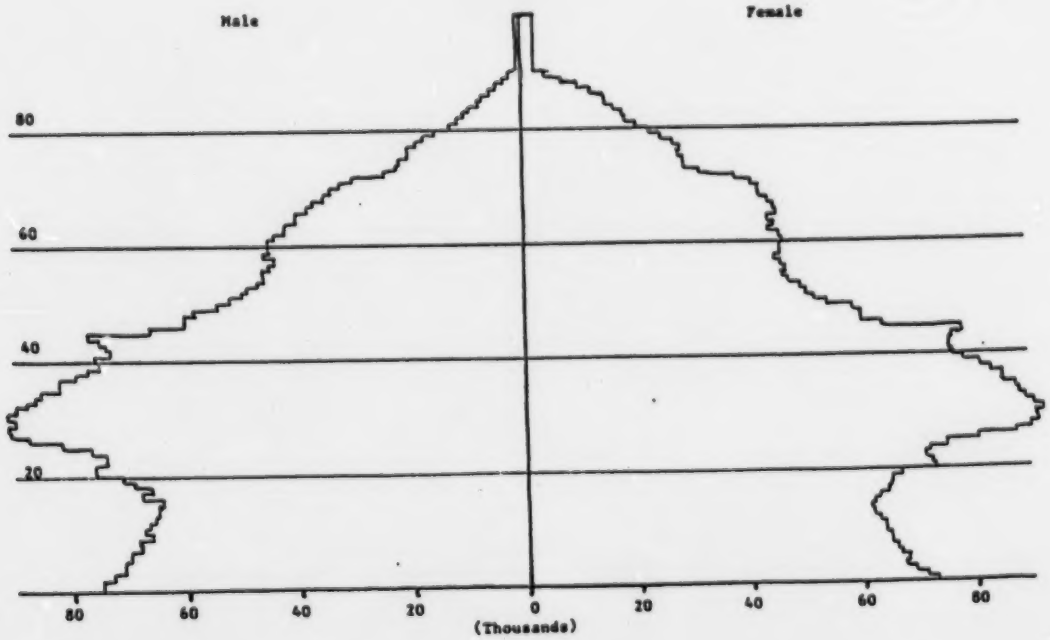


Size of annual cohorts (for a total population of 100,000)
Effectifs des générations annuelles (pour une population totale de 100,000)

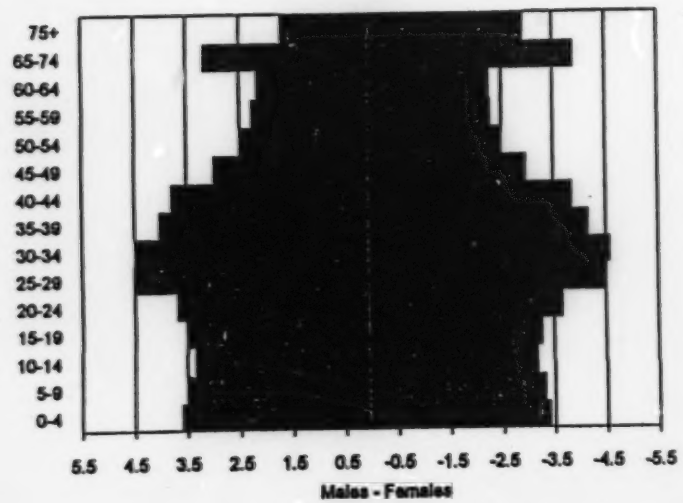
CANADA, 1991



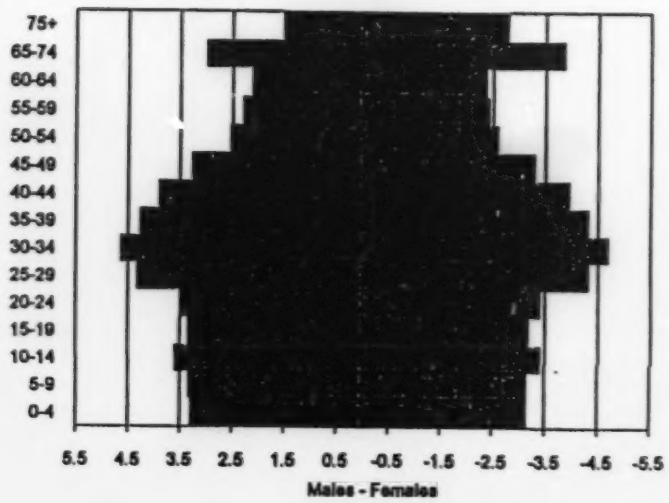
ONTARIO, 1991



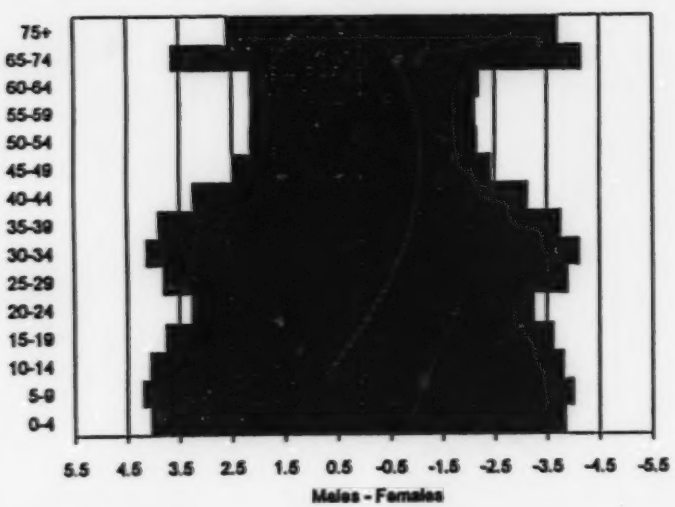
Ontario
Population Distribution by Age and Sex
Percent
1991



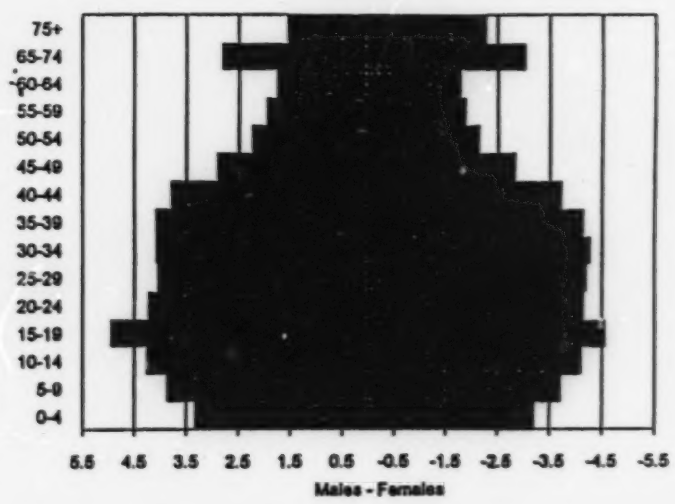
Quebec
Population Distribution by Age and Sex
Percent
1991



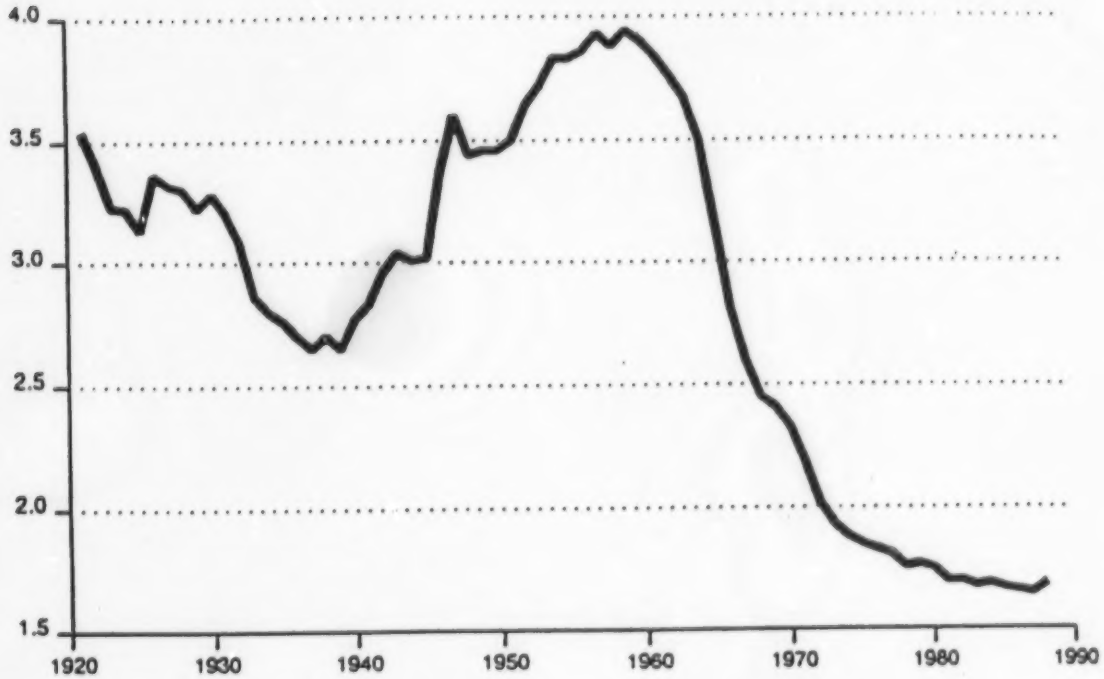
Saskatchewan
Population Distribution by Age and Sex
Percent
1991



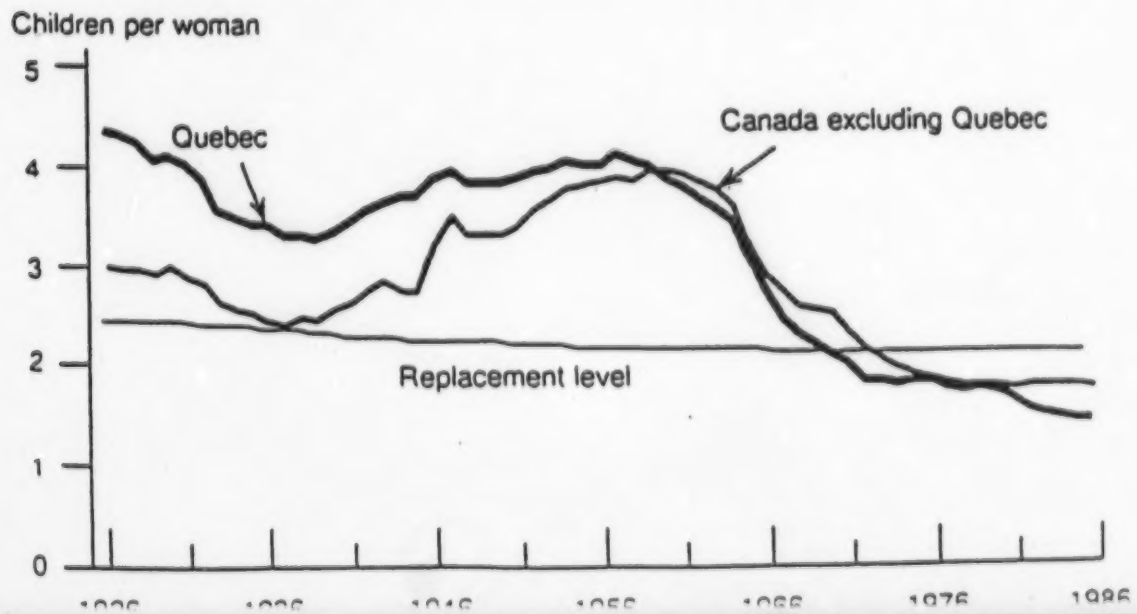
Newfoundland
Population Distribution by Age and Sex
Percent
1991



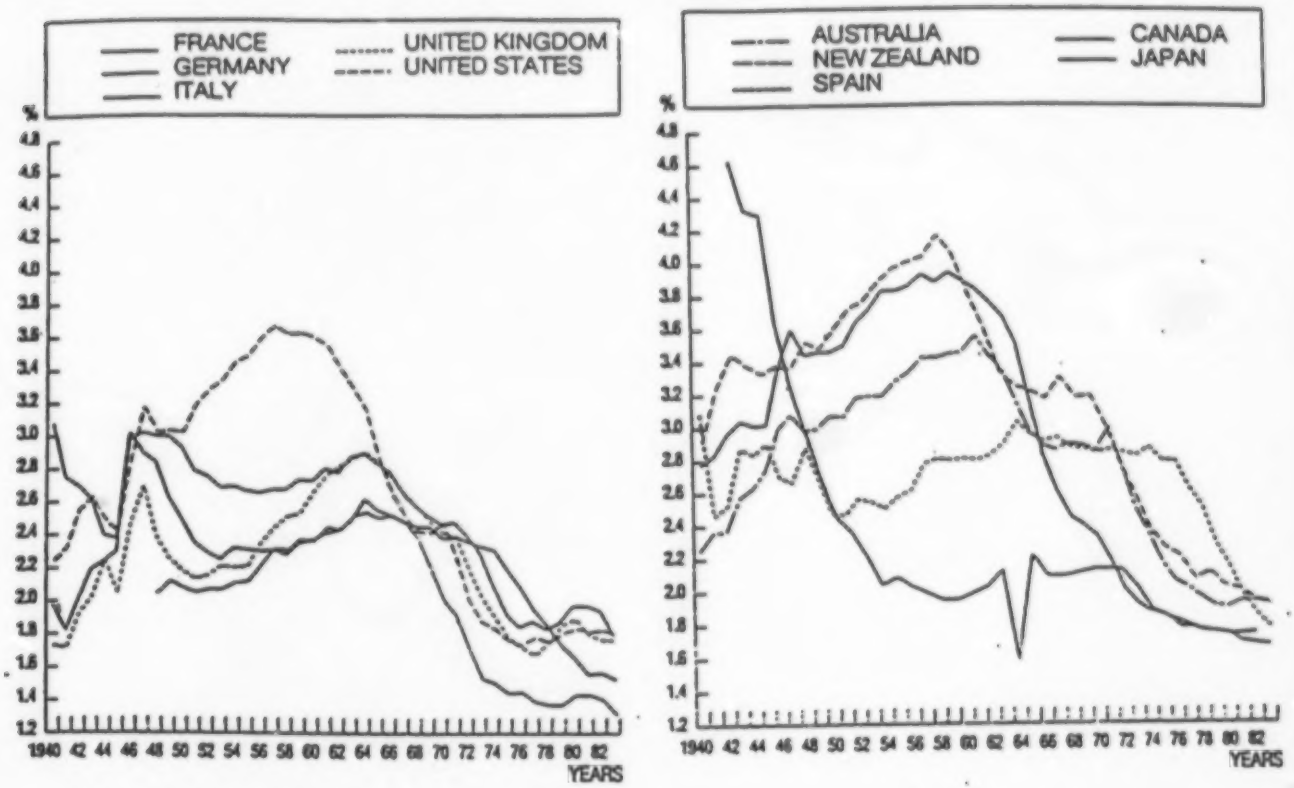
Period Total Fertility Rate, Canada, 1921–88



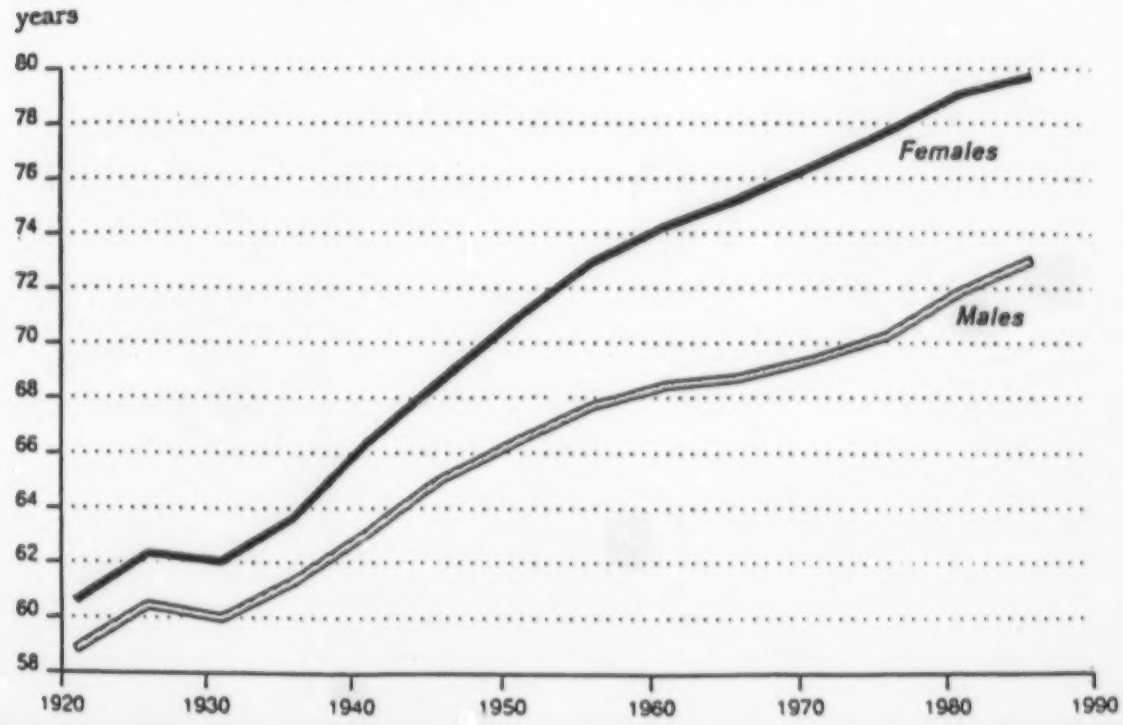
Total fertility rate, Quebec and rest of Canada, 1926-1986



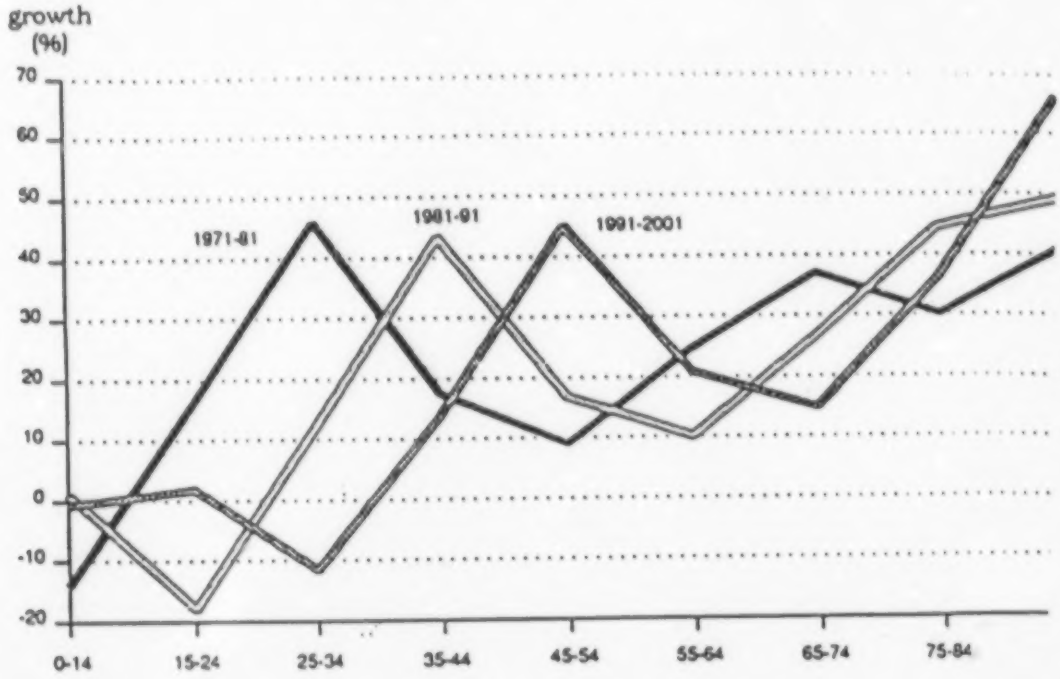
TOTAL FERTILITY RATES
1940-1983



Life Expectancy at Birth, Canada, 1921–86



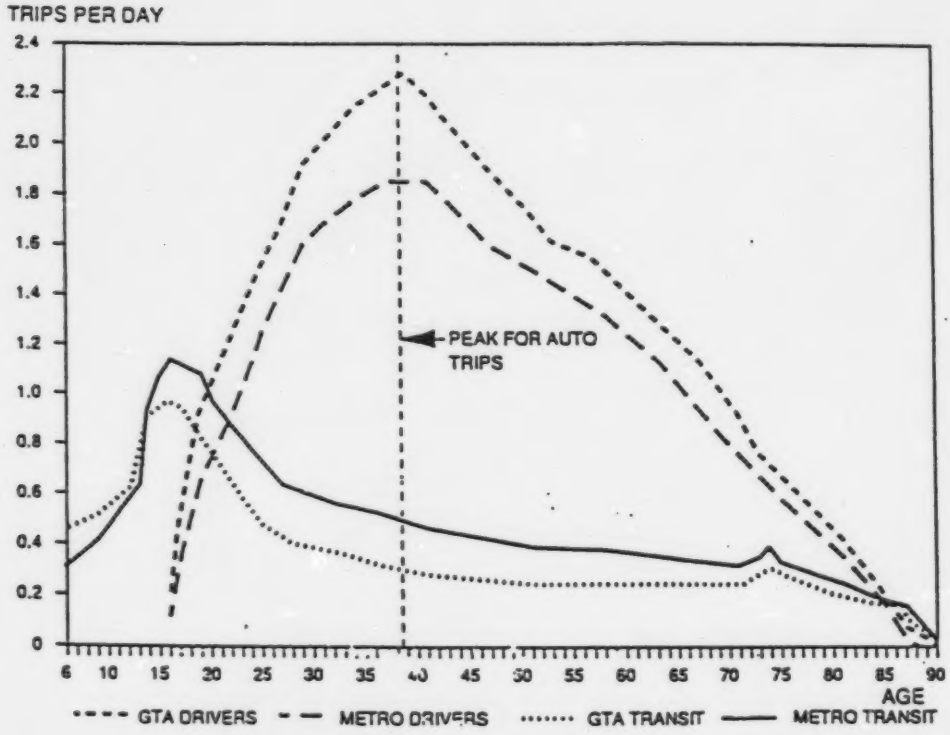
Population Growth by Age Group, Canada, 1971–2000



CAREER PATHS AND ASSOCIATED CHARACTERISTICS

Career Path	Direction of Job Movement	Number of Occupations	Organizational Structure	Reward Systems
Steady State	None	One	Rectangular	Tenure, Fringe Benefits
Linear	Upward	Two	Tall Pyramid	Promotion, Power
Spiral	Lateral/ Upward	Five (?)	Flat Pyramid	Reeducation, Retraining
Transitory	Lateral	Many	Temporary Teams	Variety, Time Off

TRIP RATES BY MODE AND AGE



THE AGE OF OUTDOOR RECREATION IN CANADA

Table 4
PROJECTED OUTDOOR RECREATION ACTIVITY GROWTH RATES, 1986-2011
(Percent)[2]

Recreation Activity	1986-91	1991-96	1996-2001	2001-06	2006-11	1986-2011
RECREATIONAL SPORTS	2.23	1.83	1.31	1.16	0.82	2.23
Bowling	1.79	1.51	1.39	1.08	0.59	1.55
Golfing	1.72	1.43	1.44	1.39	1.25	1.54
Horseback Riding	1.58	1.39	1.32	1.15	0.82	1.47
Tennis	0.54	1.25	1.24	1.71	0.85	1.16
WATER BASED	1.46	1.03	1.19	1.40	1.16	1.15
Boating	1.45	1.11	1.18	1.37	1.15	1.15
Canoeing	1.50	1.25	1.25	1.75	0.44	1.21
Sailing	1.14	1.19	1.19	1.16	1.17	1.18
Swimming	1.13	1.08	1.19	1.11	1.13	1.19
Motor Boating	1.14	1.15	1.14	1.15	0.75	1.17
WINTER	1.33	1.19	1.12	0.99	0.75	0.94
Ice Boating	0.55	1.12	1.11	0.85	0.39	0.83
Skiing	1.35	1.16	1.19	1.15	0.84	1.13
Skidoing	1.26	1.14	1.17	0.11	0.38	0.69
NATURAL ENVIRONMENT	1.17	1.08	1.13	1.15	1.12	1.15
Birdwatching	1.17	1.15	1.16	1.13	1.15	1.18
Camping	1.16	1.18	1.15	1.13	1.13	1.12
Hiking	1.14	1.17	1.19	1.18	1.12	1.19
Nature Walking	1.16	1.15	1.17	1.18	1.16	1.15
Picnicking	1.16	1.15	1.13	1.14	1.13	1.13
GENERAL RECREATION	1.14	1.18	1.12	1.15	1.14	1.12
Attend Concerts	1.11	1.12	1.12	1.14	1.14	1.13
Attend Sports	1.08	1.12	1.13	1.10	1.11	1.14
Picnicking	1.17	1.18	1.14	1.14	1.18	1.17
Pleasure Driving	1.13	1.13	1.16	1.15	1.11	1.15
Sightseeing	1.14	1.12	1.14	1.08	1.16	1.14
POPULATION: Total	1.12	1.13	0.98	1.10	1.13	1.14
16 Years & Over	1.14	1.19	1.16	1.17	1.16	1.13

Source: Calculations by the author.
Note: 1. See notes to Table 2. The projections were 1982 activity participation rates (see Table 2) and the High population projection (see Table 2).
2. Per cent growth over five year periods.

OLAPS RESULTS

ACTIVITY LEVELS, 1986-2011

(Participation - Often; Population - Projection No.3)

Activity	1986	1991	1996	2001	2006	2011	25-Year Growth
Volunteering	1,022.3	1,136.1	1,239.7	1,338.5	1,432.1	1,525.5	49.2%
Attend the Symphony	267.3	292.9	320.1	348.7	375.9	398.4	49.1%
Church Activities	1,680.0	1,847.0	2,008.6	2,170.1	2,326.7	2,478.7	47.5%
Attend Plays	544.0	600.5	655.7	711.4	758.6	797.6	46.6%
Go to Museums	492.8	535.3	580.8	629.3	677.6	718.8	45.9%
Hobbies	2,829.4	3,122.0	3,383.6	3,635.4	3,879.8	4,110.5	45.3%
Resting	1,645.3	1,780.1	1,915.8	2,058.0	2,209.8	2,356.5	43.2%
Reading	5,455.3	5,954.9	6,383.1	6,801.5	7,197.9	7,562.5	38.6%
Watch TV	4,154.1	4,497.0	4,799.0	5,104.1	5,413.3	5,697.1	37.1%
Spend Time Outdoors	3,571.0	3,860.4	4,095.1	4,327.3	4,558.9	4,765.7	33.5%
Shopping	1,673.9	1,778.9	1,884.4	2,003.4	2,126.0	2,233.6	33.4%
Listen to the Radio	5,496.0	5,897.2	6,240.8	6,599.5	6,955.6	7,254.8	32.0%
Arts	1,201.8	1,275.1	1,347.3	1,429.4	1,514.0	1,584.3	31.8%
Social Activities	4,388.9	4,701.1	4,961.3	5,232.8	5,501.9	5,729.3	30.5%
Adult Education Courses	1,086.0	1,160.7	1,220.1	1,282.8	1,338.8	1,379.3	27.1%
Outdoor Activities	2,042.0	2,175.5	2,277.3	2,384.3	2,491.9	2,575.0	26.1%
Participate in Sports	2,858.3	3,031.5	3,154.6	3,286.2	3,409.2	3,497.4	22.4%
Attend Sports (Spectator)	1,224.6	1,282.1	1,329.2	1,387.7	1,438.6	1,466.6	19.8%
Go to the Movies	1,134.0	1,168.9	1,206.5	1,262.0	1,317.4	1,348.3	18.9%
Population ('000)	7,872.1	8,523.7	9,068.5	9,611.5	10,135.1	10,598.2	34.6%

OLAPS RESULTS

ACTIVITY LEVELS, 1986-2011

(Participation - Outdoor; Population - Projection No.3)

Activity	1986	1991	1996	2001	2006	2011	25-Year Growth
Gardening/Yardwork	451.4	510.8	562.2	608.9	646.7	684.3	51.6%
Hunting	293.1	322.2	350.5	378.8	406.7	431.7	47.3%
Going on Picnics	345.0	379.4	408.9	437.2	463.3	487.8	41.4%
Boating/Canoeing	875.9	957.6	1,031.4	1,105.2	1,174.4	1,233.5	40.8%
Going for Walks	3,750.2	4,110.9	4,418.2	4,713.2	4,995.8	5,267.0	40.4%
Snowshoeing	115.0	126.0	138.3	147.8	153.0	156.6	36.2%
Cross-country Skiing	627.0	678.1	724.0	771.6	817.6	853.3	36.1%
Swimming	323.9	350.9	376.2	403.0	424.6	439.2	35.6%
Fishing	1,116.2	1,197.6	1,266.5	1,338.1	1,411.0	1,471.3	31.8%
Hiking	735.2	794.8	840.7	886.0	928.0	960.5	30.6%
Other	871.8	926.8	963.1	999.6	1,044.3	1,082.0	24.1%
Bicycling	809.9	865.9	901.3	935.0	968.8	995.9	23.0%
Snowmobiling	558.3	589.6	610.1	632.0	659.0	680.0	21.8%
Camping	1,034.1	1,088.5	1,125.2	1,166.3	1,209.0	1,238.3	19.7%
Skating	264.5	282.1	292.0	301.7	306.4	306.7	16.0%
Downhill Skiing	93.1	94.5	95.4	97.8	99.6	98.9	6.2%
Population ('000)	7,872.1	8,523.7	9,068.5	9,611.5	10,135.1	10,598.2	34.6%

OLAPS RESULTS

ACTIVITY LEVELS, 1986-2011

(Participation - Sports; Population - Projection No.3)

Activity	1986	1991	1996	2001	2006	2011	25-Year Growth
Darts	77.2	88.2	96.9	104.1	111.0	119.6	54.9%
Curling	242.5	274.9	304.2	331.6	352.6	370.2	52.7%
Golf	857.8	959.2	1,051.1	1,137.4	1,220.4	1,304.1	52.0%
Walking for Exercise/etc.	1,523.1	1,685.9	1,840.7	1,991.9	2,144.4	2,290.7	50.4%
Bowling	380.4	422.0	454.8	483.8	515.3	549.5	44.5%
Aerobics/etc.	1,659.2	1,806.3	1,937.9	2,069.7	2,195.9	2,311.3	39.3%
Dancing	167.4	182.2	194.7	206.9	218.7	230.0	37.4%
Swimming	1,868.8	2,029.0	2,163.4	2,295.8	2,421.6	2,539.5	35.9%
Skiing	1,335.5	1,454.3	1,547.0	1,636.7	1,711.6	1,766.1	32.2%
Other	681.7	740.8	785.5	827.6	863.5	899.7	32.0%
Sailing/Boating	179.5	197.3	208.3	217.3	226.4	234.0	30.4%
Pool/Billiards	68.8	73.5	77.4	81.5	85.4	87.9	27.8%
Bicycling	1,061.0	1,137.5	1,190.5	1,242.7	1,290.9	1,326.3	25.0%
Jogging/Running	773.7	815.3	847.2	884.2	919.2	939.0	21.4%
Tennis/Badminton/etc.	703.6	749.5	782.1	816.9	839.2	846.7	20.3%
Karate/Judo/Wrestling	113.0	118.0	122.0	127.1	131.5	135.0	19.5%
Baseball/Softball	1,310.4	1,388.5	1,427.0	1,463.9	1,495.6	1,511.9	15.4%
Skating/Roller Skating	459.1	501.4	515.8	521.8	525.2	529.2	15.3%
Weightlifting/etc.	631.4	662.2	678.7	697.9	712.3	715.2	13.3%
Basketball	424.5	429.2	437.6	455.4	472.4	479.2	12.9%
Squash/Racquet Ball/etc.	378.9	408.0	418.7	425.8	425.7	420.8	11.1%
Soccer	313.6	321.1	326.0	335.2	343.9	345.9	10.3%
Hockey	1,024.0	1,068.1	1,083.6	1,101.6	1,120.6	1,127.5	10.1%
Volleyball	412.3	418.5	424.8	438.8	450.9	452.2	9.7%
Football/Rugby	334.7	338.3	340.2	347.7	356.3	358.7	7.2%
Population ('000)	7,872.1	8,523.7	9,068.5	9,611.5	10,135.1	10,598.2	34.6%

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